

Plaintiff: _____
 Address: _____
 -VS-
 Defendant: _____
 Address: _____

**Management Report by
 Parties and Proposed
 Scheduling for Case**

Case No. _____
 Case Code _____

1. Meeting of parties.

Pursuant to the Court's Standing Order for cases in the Commercial Docket (and Scheduling Order), a meeting was held on [Date] _____, 20____ at [Time] _____ and was attended by:

For plaintiff [Name] _____.

For defendant [Name] _____.

2. Nature of case; summary of dispute.

[No more than 250 words for each litigant, or 500 words if a joint description.]

3. Status of pleadings.

[Describe status of pleadings, proposed amendments, service of process, addition of new parties, any initial pleading motions.]

4. Discovery Plan.

The parties jointly propose to the Court the following discovery plan:

[Use separate paragraphs or subparagraphs as necessary if parties disagree.]

Discovery will be needed on the following subjects:

[Brief description of subjects on which discovery will be needed.]

All discovery commenced in time to be completed by [Date] _____.

Discovery on issue for early discovery to be completed by [Date] _____.

Dates for preliminary disclosure of fact witness:

From plaintiff: _____

From defendant: _____

Maximum of _____ interrogatories by each party to any other party. [Responses due _____ days after service].

Maximum of _____ requests for admission by each party to any other party. [Responses due _____ days after service.]

Maximum of _____ depositions by plaintiff and _____ by defendant.

Each deposition [other than of _____] limited to maximum of _____ hours unless extended by agreement of parties.

Disclosure and reports from retained experts due:

From plaintiff: _____

From defendant: _____

Supplementations under §804.01(5), Wis. Stats.

[List of dates or intervals]: _____

5. Preservation of Discoverable Information:

The parties agree to handle the preservation of discoverable information in the following way:

6. **Electronically Stored Information:**

The parties agree to handle electronically stored information in the following way:

7. **Other Items:**

[Use separate paragraphs or subparagraphs as necessary if parties disagree.]

Plaintiff/Defendant requests a protective order on materials and information provided in discovery.

The parties ☐ request ☐ do not request a conference with the Court before entry of the scheduling order.

The parties request a pretrial conference in [Month and Year] _____.

Plaintiff should be allowed until [Date] _____ to join additional parties and until [Date] _____ to amend the pleadings.

Defendant _____ should be allowed until [Date] _____ to join additional parties and until [Date] _____ to amend the pleadings.

All potentially dispositive motions should be filed by [Date] _____.

Settlement is

☐ cannot be evaluated prior to [Date] _____.

☐ the parties agree to use _____ as a mediator in this matter. If there is no agreed mediator, then the parties agree to this process to select a mediator: _____.

Final lists of witnesses and exhibits should be due from plaintiff by [Date] _____ from defendant by [Date] _____.

Parties should have _____ days after service of final lists of witnesses and exhibits to list objections.

The case should be ready for trial by [Date] _____ and at this time is expected to take approximately [Length of time] _____.

BY THE PARTIES:

Plaintiff/Defendant

Name Printed or Typed

Date

Plaintiff/Defendant

Name Printed or Typed

Date

DISTRIBUTION:

1. Court
2. Plaintiff
3. Defendant
4. Other: _____